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EXAMINER

TRAN, QUOC A

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2176

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PAPER

Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Office Action Summary	Application No. 10/692,525	Applicant(s) TANGEN ET AL.	
	Examiner Quoc A. Tran	Art Unit 2176	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

- 1) ☒ Responsive to communication(s) filed on 20 March 2009.
- 2a) ☒ This action is **FINAL**. 2b) ☐ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

- 4) ☒ Claim(s) 1,3-18,20-23 and 25-42 is/are pending in the application.
- 4a) Of the above claim(s) _____ is/are withdrawn from consideration.
- 5) ☐ Claim(s) _____ is/are allowed.
- 6) ☒ Claim(s) 1,3-18,20-23 and 25-42 is/are rejected.
- 7) ☐ Claim(s) _____ is/are objected to.
- 8) ☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

- 9) ☒ The specification is objected to by the Examiner.
- 10) ☒ The drawing(s) filed on 20 March 2009 is/are: a) ☒ accepted or b) ☐ objected to by the Examiner.
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some * c) ☐ None of:
- ☐ Certified copies of the priority documents have been received.
 - ☐ Certified copies of the priority documents have been received in Application No. _____.
 - ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

* See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

- | | |
|--|---|
| 1) <input checked="" type="checkbox"/> Notice of References Cited (PTO-892) | 4) <input type="checkbox"/> Interview Summary (PTO-413) |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948) | Paper No(s)/Mail Date. _____ |
| 3) <input type="checkbox"/> Information Disclosure Statement(s) (PTO/SB/08) | 5) <input type="checkbox"/> Notice of Informal Patent Application |
| Paper No(s)/Mail Date _____ | 6) <input type="checkbox"/> Other: _____ |

DETAILED ACTION

This action is a Final Office Action, in response to Applicant's Amendments/Remarks filed 03/20/2009. Claims 1, 3-18, 20-23, and 25-42 are pending. Claims 1, 18, and 23 are independence claims. Applicants have amended claims 1, 18 and 23. Effective filing date is **10/24/2003** (Hyperion Solutions Corporation).

Objection to the specification set forth in the previous office action dated 12/22/2008 is hereby withdrawn due to applicant amendment to claims 18 and 23 of the current paper.

Rejection under 35 U.S.C. 101 to claims 18, 20-23, 25-39 and 41-42 set forth in the previous office action is hereby withdrawn due to applicant amendment to claims 18 and 23 of the current paper.

Specification

The specification is objected to as failing to provide proper antecedent basis for the claimed subject matter. See 37 CFR 1.75(d)(1) and MPEP § 608.01(o). Correction of the following is required:

the recited "*does not create a persistent associate of the internal metadata with the external metadata*" and "*second report may be defined with uses of the second mapping*" of claim 1, at page 3 lines 1-13; claim 18, at page 9, lines 8-12 and claim 23 at page 12, lines 13-17.

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The Specification does not mention those recited limitations. Thus, there is no support or antecedent basis for the recited “*does not create a persistent associate of the internal metadata with the external metadata*” and “*second report may be defined with uses of the second mapping*” of claim(s) 1, 18 and 23, that allows the meaning of the terms to be ascertained, as required in 37 CFR 1.75(d)(1).

Claim Rejections - 35 USC § 112

The following is a quotation of the first paragraph of 35 U.S.C. 112:

The specification shall contain a written description of the invention, and of the manner and process of making and using it, in such full, clear, concise, and exact terms as to enable any person skilled in the art to which it pertains, or with which it is most nearly connected, to make and use the same and shall set forth the best mode contemplated by the inventor of carrying out his invention.

Claims 1, 3-18, 20-23 and 25-42 are rejected under 35 U.S.C. 112, **first paragraph**, as failing to comply with the written description requirement. The claims contain subject matter which were not described in the Specification in such a way as to reasonably convey to one skilled in the relevant art that the inventors, at the time the application was filed, had possession of the claimed invention.

Claims 1, 3-18, 20-23 and 25-42:

Independent claim(s) 1, 18 and 23 recite the limitations “*does not create a persistent associate of the internal metadata with the external metadata*” and “*second report may be defined with uses of the second mapping*” [see amendment to the independent of claim 1, at page 3 lines 1-13; independent claim 18, at page 9, lines 8-

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12 and independent claim 23 at page 12, lines 13-17. There is **no** mention in the original Specification of this feature.

The examiner notes that the instant specification indicates that the invention is directed to a user interface for establishing mappings internal and/or external metadata in a report design environment (see the instant specification at page 3 para [0005-006]). Moreover, the instant specification also further describes the mappings, ***once created, then stored as part of the report definition for later use*** (see the instant specification at page 3 para [0005-006]). There is **no** mention in the original Specification of the limitation “*does not create a persistent associate of the internal metadata with the external metadata*” and “*second report may be defined with uses of the second mapping*”; in such a way as to reasonably convey to one skilled in the relevant art that the inventors, at the time the application was filed, had possession of the claimed invention.

If the examiner has overlooked the portion of the original Specification that describes this feature of the present invention, then Applicant should point it out (by page number and line number) in the response to this Office Action.

Claims 3-17, 20-22 and 25-42, are rejected using the same rationale because these claims are dependent upon Claims 1, 18 and 23, respectively.

The following is a quotation of the second paragraph of 35 U.S.C. 112:

The specification shall conclude with one or more claims particularly pointing out and distinctly claiming the subject matter which the applicant regards as his invention.

Claim(s), 3-18, 20-23 and 25-42 rejected under **35 U.S.C. 112, second paragraph**, INDEFINITE.

Evidence that independent claims 1, 18 and 23, recite the limitations “*does not create a persistent associate of the internal metadata with the external metadata*” and “*second report may be defined with uses of the second mapping*” [see amendment to the independent of claim 1, at page 3 lines 1-13; independent claim 18, at page 9, lines 8-12 and independent claim 23 at page 12, lines 13-17”, as explained above these terms are not used in the original disclosure, therefore it is indefinite what is being claimed.

Accordingly, dependent claims 3-17, 20-22 and 25-42, are rejected using the same rationale because these claims are dependent upon independent claims 1, 18 and 23, respectively.

In the interest of compact prosecution, the application is further examined against the prior art, as stated below, upon the assumption that the applicants may overcome the above stated rejections under 35 U.S.C. 112.

Claim Rejections - 35 USC § 103

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

Claims 1, 3-18, 20-23, and 25-42 rejected under 35 U.S.C. 103(a) as being unpatentable over **Davis** et al (US 20030041077A1, filed 01/23/2002) [hereinafter "Davis"], in view of **Wason** et al (US 20040210838A1, filed 05/29/2002) [hereinafter "Wason"],

Regarding independent claim 1,

Davis teaches:

A method for establishing a mapping between internal metadata for a database and external metadata for a report,

(At Fig. 2-3 and at Page 5 Para [0061-0067] → Davis discloses this limitation, as clearly indicated in the cited text, [e.g. the internal XBRL data [e.g., Internal metadata] and report items 222-224 mapped by RDX mapper item 210 to a web server database storage included XBRL documents item 340 [e.g. external metadata] in a computer network item 314.

The above interpretation is supported the instant specification at Page 2 Para [0003] through Page 3 Para [0004, the last two sentences, which is stated "XBRL is

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based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata", it is reasonable to find that the term, "a mapping between internal metadata for a database and external metadata" is equivalent to the XBRL of Davis.)

the method comprising: reading the internal metadata from the database, the internal metadata including metadata that describes data stored in the database;

(At Fig. 2 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as clearly indicated in the cited text, [e.g., the internal XBRL data [e.g., Internal metadata] and report items 222-224 mapped by RDX mapper item 210 to the a web server database storage included XBRL documents item 340 [e.g. external metadata] in a computer network item 31.)

generating and displaying a screen, the screen including a grid having rows and columns,

(At figure 2 and at page 6 paragraph [0066] and page 10 paragraph [00110] → Davis disclosed this limitation, as clearly indicated in the cited text, [e.g., XBRL instance documents elements are displayed [0066]. Also RDX mapper 210 supports pointers

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reference information in a spreadsheets (e.g., row and/or column), or other XBRL documents [0010].])

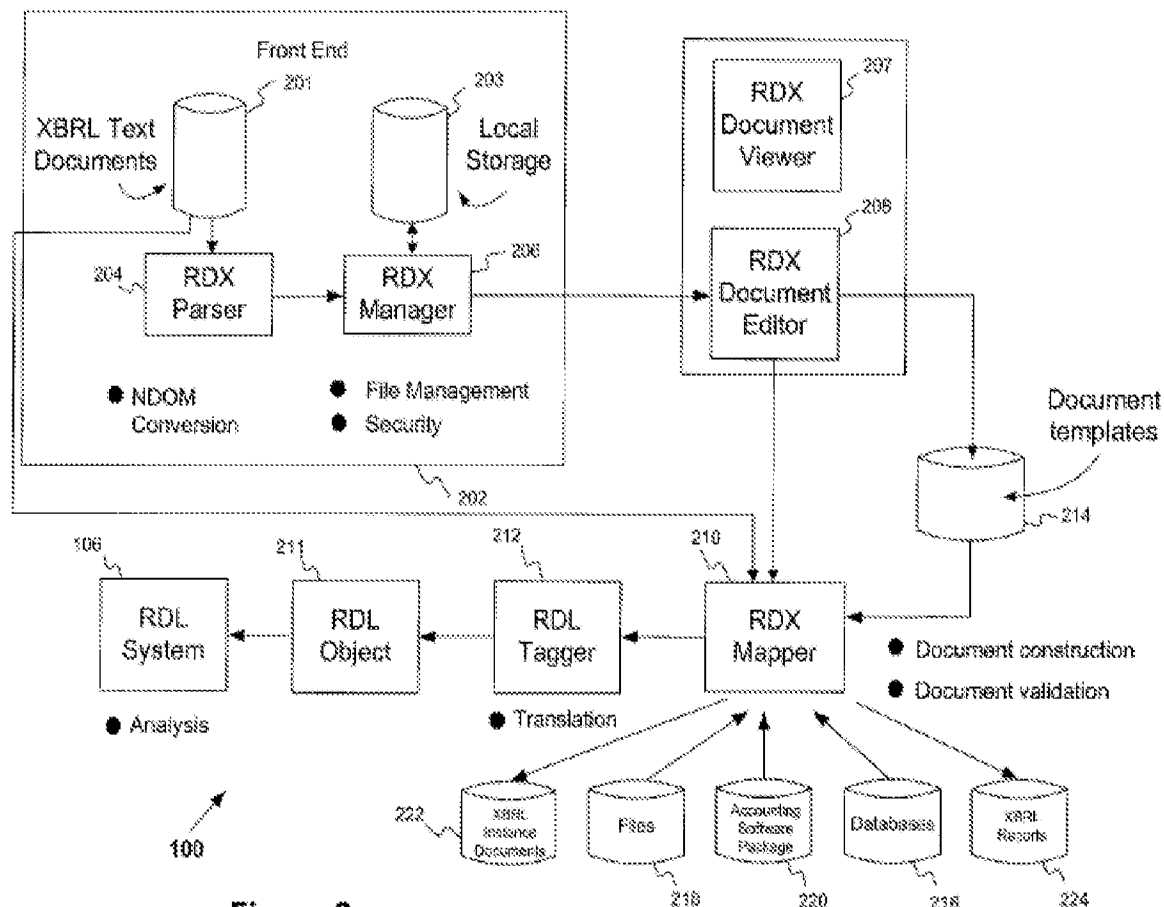


Figure 2

In addition, Davis does not expressly teach, but Wason teaches:

the rows and columns having dimensional metadata from the internal metadata placed in the grid as row and/or column headings, the grid further including the internal metadata read from the database;

(At Page 2 paragraph [0028] and at page 3 paragraph [0067] → Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., all documents are stored within the same set of relational database tables, the selection of rows/columns to present and the

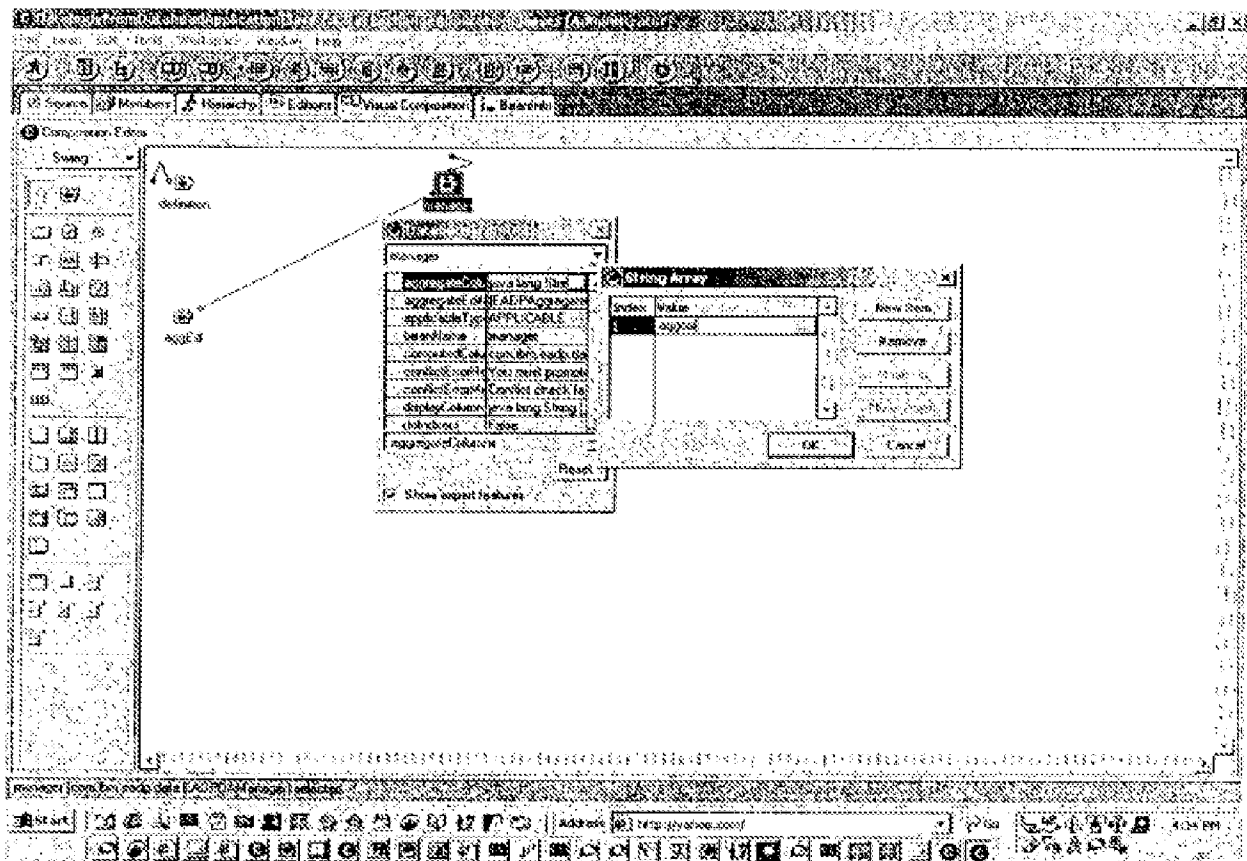
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titles for those rows/columns are determined by the template definition for that type of document (dimensional metadata).])

receiving from a user a selection of a portion of the grid, the

selection indicating one or more cells of the grid;

(At figure 6 Page 2 paragraph(s) [0030-0031]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., a mechanism (the "aggregate editor") is provided to present the proper field to the user and to map user input to the correct database columns.])



in response to receiving the user selection: determining the internal metadata displayed on the grid that corresponds to the one or more cells, the internal metadata corresponding to the one or more cells forming a subset of the internal metadata displayed on the grid, wherein the user modifies the internal metadata to indicate the internal metadata is to be mapped to external metadata;

(At figure 6 Page 2 paragraph(s) [0030-0031]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., user input to the correct database columns.] Also Wason further discloses when a document is opened; an entire document (the datahead and databody fields presented together). Moreover the EADP provides the databody, which is a subobject of the datahead, and **drilling down** to the databody from the datahead will show all the databody elements, along with the datahead elements as focal data (e.g., cells forming a subset of the internal metadata displayed on the grid) This is generally discloses at page 3 paragraph(s) 0066-0069 of Wason.])

presenting to the user one or more user interface controls for receiving a definition of external metadata for the subset of the internal metadata, the definition of external metadata specifying particular associations of the subset of internal metadata with the external metadata in the report, the definition describing all data points within the user selection;

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(At the Abstract→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., the presentation and the control of heterogeneous documents content utilized the service of the Enterprise Application Development Platform (EADP).] Also Wason further discloses when each document is defined by document definition; an entire document (e.g., the datahead and databody fields presented together). EADP provides the databody, which is a subobject of the datahead, and **drilling down** to the databody from the datahead will show all the databody elements, along with the datahead elements as focal data (e.g., the definition describing all data points within the user selection) This is generally discloses at page 3 paragraph(s) 0065-0069 of Wason.)

receiving, via the one or more user interface controls, the definition of external metadata from the user, and based on the definition of the external metadata, creating a first mapping between the selected internal metadata and the external metadata;

(At figure 6 Page 2 paragraph(s) [0030-0031]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., mapping user input to the correct database columns s.] Also Wason further discloses a flexible mechanism is provided to define which data type for a particular field should have (based on document type and the field number). A mechanism (the "aggregate editor") is provided to present the proper field to the user and to map user input to the correct database columns; when necessary "Externalize Definition of Keyword Selections" is used for mapping between the

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selected internal metadata and the external metadata. This is generally discloses at page 3 paragraph(s) 0031-0036 of Wason.])

generating a report definition for the report, the report definition describing how report data described by the external metadata in the report is to be produced from the data stored in the database and described by the internal metadata;

(At the Abstract→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., the presentation and the control of heterogeneous documents content by the service of the Enterprise Application Development Platform (EADP).] Also Wason further discloses when each document is defined by document definition [e.g., a report definition]; this is generally discloses at page 3 paragraph(s) 0065-0069 of Wason.] Also Wason further discloses a mechanism (the "aggregate editor") is provided to present the proper field to the user and to map user input to the correct database columns; when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata. This is generally discloses at page 3 paragraph(s) 0031-0036 of Wason.])

storing the report definition, the report definition including the first mapping of internal metadata to external metadata for the report,

(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword

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Selections is used for mapping between the selected internal metadata and the external metadata; these definitions are stored in the relational database and can be modified in the deployed application without a need to redeploy.])

wherein the first mapping applies only to a particular report and does not create a persistent association of the internal metadata with the external metadata such that a second report may be defined which uses a second mapping of the internal metadata to the external metadata, said second mapping being different from the first mapping, said second mapping associated with said second report.

(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata; these definitions are stored in the relational database and can be modified in the deployed application without a need to redeploy (e.g., does not create a persistent association of the internal metadata with the external metadata).] Also Wason further discloses external column names in EADP are setting by the external names dictionary editor in the database definition class [Wason Para [0075]; Moreover, EADP "site searched" provides a list of tables that can be searched as Document plus the template name and to map user input to the correct database columns using the same scheme for the list form for documents so that they do not have to be retrieved over and over again (e.g., said second mapping being different from the first mapping, said

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second mapping associated with said second report.) This is generally set forth at page 4 paragraph(s) [0076-0079] of Wason.]

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis' XBRL report to include a means of said receiving from a user a selection of a portion of the grid having dimensional metadata from the internal metadata placed in the grid as row and/or column headings, the internal metadata corresponding to the one or more cells forming a subset of the internal metadata displayed on the grid, wherein the user modifies the internal metadata to indicate the internal metadata is to be mapped to external metadata via user interface controls, the definition of external metadata from the user, and based on the definition of the external metadata, creating a first mapping between the selected internal metadata and the external metadata; generating a report definition for the report; describing how report data described by the external metadata in the report is to be produced from the data stored in the database and described by the internal metadata; and storing the report definition, the report definition including the first mapping of internal metadata to external metadata for the report, wherein the first mapping applies only to a particular report and does not create a persistent association of the internal metadata with the external metadata such that a second report may be defined which uses a second mapping of the internal metadata to the external metadata, said second mapping being different from the first mapping, said second mapping associated with said second report as taught by Wason. One of ordinary skill in the art would have been motivated

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to modify this combination because Davis and Wason are both directed to a method and system of generating, displaying, analyzing and controlling XBRL report. This combination provides a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document utilizing internal/external metadata of XBRL- See Davis at Para 24.

*Regarding **independent claim 18**,*

is directed to an apparatus for performing the steps of claim 1 cites above.

Thus, Davis and Wason disclose every limitation of Claim 18 and provides proper reasons to combine, as indicated in the above rejections for Claim 1- see Davis at Para 68, discloses various System Hardware Components.

Also Davis further discloses:

an internal metadata grid organizer , see Davis at figure 2 item 210, a RDX mapper].

In addition, Wason further teaches:

the external metadata user definition receiver being further configured to receive, via the one or more user interface controls, the definition of the external metadata; an internal metadata-to-defined external

metadata mapping creator coupled to create a first mapping between the selected internal metadata and the particular external metadata specified by the definition of external metadata;

(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata; these definitions are stored in the relational database and can be modified in the deployed application without a need to redeploy.] Also Wason further discloses a mechanism (the "aggregate editor") is provided to present the proper field to the user and to map user input to the correct database columns; when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata. This is generally discloses at page 3 paragraph(s) 0031-0036 of Wason.])

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis' XBRL report to include a means of said the external metadata user definition receiver being further configured to receive, via the one or more user interface controls, the definition of the external metadata; an internal metadata-to-defined external metadata mapping creator coupled to create a first mapping between the selected internal metadata and the particular external metadata specified by the definition of external metadata as taught by Wason. One of ordinary skill in the art would have been motivated to modify this combination because Davis and

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Wason are both directed to a method and system of generating, displaying, analyzing and controlling XBRL report. This combination provides a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document utilizing internal/external metadata of XBRL- See Davis at Para 24.

*Regarding **independent claim 23**,*

is directed to an apparatus for performing the steps of claim 1 cites above. Thus, Davis and Wason disclose every limitation of Claim 23 and provides proper reasons to combine, as indicated in the above rejections for Claim 1- see Davis at Para 68, discloses various System Hardware Components.

*Regarding **claims 3 and 25**,*

Davis and Wason teach the method of claims 1 and 23 and further comprise:

determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and

receiving from said user a selection of an item of predefined metadata from said list.

(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata; these definitions are stored in the relational database and can be modified in the deployed application without a need to redeploy.] Also Wason further discloses External column names in EADP are set using the external names dictionary editor in the database definition class [Wason Para [0075]; Moreover, EADP site search provides a list of tables that can be searched as Document plus the template name and to map user input to the correct database columns using the same scheme for the list form for documents so that they do not have to be retrieved over and over again. This is generally set forth at page 4 paragraph(s) [0076-0079] of Wason.])

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis' XBRL report to include a means of said determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list as taught by Wason. One of ordinary skill in the art would have been

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motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 4 and 26**,*

Davis and Wason teach the method of claims 3 and 25 and further comprise:

wherein said list is provided in a tree control.

(See Davis at Para 62, discloses a NDOM form a tree structure.)

*Regarding **claim 5 and 27**,*

Davis and Wason teach the method of claims 3 and 25 and further comprise:

determining if syntax of the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is not predefined, but syntax of the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises: presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and receiving from said user a specification of external metadata to be created.

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(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata.] Also Wason further discloses External column names in EADP are set using the external names dictionary editor in the database definition class [Wason Para [0075]; Moreover, EADP site search provides a list of tables that can be searched as Document plus the template name and to map user input to the correct database columns using the same scheme for the list form for documents so that they do not have to be retrieved over and over again. This is generally set forth at page 4 paragraph(s) [0076-0079] of Wason.])

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Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis' XBRL report to include a means of said determining if syntax of the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is not predefined, but syntax of the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises: presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and receiving from said user a specification of external metadata to be created as taught by Wason. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user

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to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 6-7 and 28-29,***

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Wason disclose every limitation of Claims 6-7 and 28-29 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition, Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

*Regarding **claims 8 and 30,***

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Wason disclose

every limitation of Claims 8 and 30 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition, Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

*Regarding **claims 9 and 31**,*

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Wason disclose every limitation of Claims 9 and 31 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

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*Regarding **claims 10 and 32**,*

are fully incorporated similar subject of claims 1 and 4 cite above, and are similarly rejected along the same rationale. Thus, Davis and Wason disclose every limitation of Claims 10 and 32 and provide proper reasons to combine, as indicated in the above rejections for Claims 1 and 4.

In addition, Davis teaches:

an element button is selected and a text field when a custom button is selected.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

*Regarding **claims 11 and 33**,*

Davis and Wason teach the method of claims 1 and 23 and further comprise:

wherein said selection is one or more columns in said grid.

(At Fig. 2 item 207 and at Para [0067] → Davis disclosed this limitation, as clearly indicated in the cited text [e.g., The RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.), and a general user interface for RDL documents.)

*Regarding **claims 12 and 34**,*

Davis and Wason teach the method of claims 1 and 23 and further comprise:

wherein said selection is one or more columns in said grid.

(At Fig. 2 item 207 and at Para [0067] → Davis disclosed this limitation, as clearly indicated in the cited text [e.g., The RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.), and a general user interface for RDL documents.]

*Regarding **claims 13 and 35**,*

Davis and Wason teach the method of claims 1 and 23 and further comprise:

selecting individual cells in said grid.

(At Para [0116]→ Davis disclosed this limitation, as clearly indicated in the cited text [e XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters) [cell].)

*Regarding **claims 14 and 36**,*

Davis and Wason teach the method of claims 13 and 35 and further comprise:

wherein preexisting mappings for rows or columns containing said selection are overwritten for said selected individual cells.

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document editor 208 provides style sheet editing capabilities, for example, contain a set of financial statements against which several style sheets could be applied: one to show

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the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

*Regarding **claims 15 and 37**,*

Davis and Wason teach the method of claims 1 and 23 and further comprise:

receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document editor 208 provides style sheet editing capabilities, for example, contain a set of financial statements against which several style sheets could be applied: one to show the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

*Regarding **claims 16 and 38**,*

Davis and Wason teach the method of claims 1 and 23 and further comprise:

external metadata is Extensible Business Reporting Language (XBRL) metadata;

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report.)

*Regarding **claims 17 and 39,***

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Wason disclose every limitation of Claims 17 and 39 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition, Davis teaches:

. **schema manager-** (See Davis at Para 82, discloses XBRL Schema management.)

*Regarding **Claim 20,***

Davis and Wason teach the method of claim 18 and further comprise:

a predefined external metadata selection determiner coupled to said external metadata user definition receiver; and wherein said external metadata user definition receiver includes: a predefined metadata list presenter; and a predefined metadata list item receiver coupled to said predefined metadata list presenter.

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(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata.] Also Wason further discloses External column names in EADP are set using the external names dictionary editor in the database definition class [Wason Para [0075]; Moreover, EADP site search provides a list of tables that can be searched as Document plus the template name and to map user input to the correct database columns using the same scheme for the list form for documents so that they do not have to be retrieved over and over again. This is generally set forth at page 4 paragraph(s) [0076-0079] of Wason.])

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis XBRL report to include a means of said a predefined external metadata selection determiner coupled to said external metadata user definition receiver; and wherein said external metadata user definition receiver includes: a predefined metadata list presenter; and a predefined metadata list item receiver coupled to said predefined metadata list presenter as taught by Webber. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL

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document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **Claim 21**,*

Davis and Wason teach the method of claim 20 and further comprise:

a predefined external metadata syntax determiner coupled to said external metadata user definition receiver; and wherein said external metadata user definition receiver includes: an external metadata dialog box presenter; and an external metadata specification receiver coupled to said external metadata dialog box presenter.

(At Page 2 paragraph [0031-0036]→ Wason disclosed this limitation, as clearly indicated in the cited text, [e.g., when necessary Externalize Definition of Keyword Selections is used for mapping between the selected internal metadata and the external metadata.] Also Wason further discloses External column names in EADP are set using the external names dictionary editor in the database definition class [Wason Para [0075]; Moreover, EADP site search provides a list of tables that can be searched as Document plus the template name and to map user input to the correct database columns using the same scheme for the list form for documents so that they do not have to be retrieved over and over again. This is generally set forth at page 4 paragraph(s) [0076-0079] of Wason.]

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Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis XBRL report to include a means of said a predefined external metadata syntax determiner coupled to said external metadata user definition receiver; and wherein said external metadata user definition receiver includes: an external metadata dialog box presenter; and an external metadata specification receiver coupled to said external metadata dialog box presenter as taught by Webber. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

Regarding Claim 22,

Davis and Wason teach the method of claim 18 and further comprise:

a user formula receiver; a new row or column creator coupled to said user formula receiver and to said internal metadata grid organizer; a new row or column user formula placer coupled to said new row or column creator and to said user formula receiver.

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report. Also Davis further disclosed the RDX document editor 208 provides style sheet editing capabilities, for example, contain a set

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of financial statements against which several style sheets could be applied: one to show the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

*Regarding **Claims 40-42**,*

Davis and Wason teach the method of claims 1, 18 and 23 and further comprise:

the internal metadata describes data, contained in the database, from which a report is to be generated; and the screen includes tools for designing the report.

(At Fig. 2 item 207 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as clearly indicated in the cited text [e.g., the RDX document viewer, which was read from local storage item 203 of Fig. 2 as shown]. Also Davis further disclosed the RDL supports translation of XBRL instance document data into RDL format for analysis in RDL system 106. The RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.), and a general user interface for RDL documents, See Davis at Para [0067].)

It is noted that any citations to specific, pages, columns, lines, or figures in the prior art references and any interpretation of the references should not be considered to be limiting in any way. A reference is relevant for all it contains and may be relied upon

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for all that it would have reasonably suggested to one having ordinary skill in the art.

See, MPEP 2123.

Response to Arguments

Applicant's arguments filed 03/20/2009 have been considered but are moot in view of the new ground(s) of rejection, which cited above (see the remarks page 17 of 19).

It is noted; Applicant's amendments necessitated the new ground(s) of rejection presented in this Office action (see above for details).

Further, the examiner introduces **Wason** [new reference] (see above for details). In addition, it is noted the Examiner maintains the **Davis** reference; since discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report (Para 27) which represented in a "Tree View for Reusable Data Markup Language" (Fig. 9 and Para 104) wherein RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk) (Para 59). Davis further discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports.

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XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Para 23 and Para 4). Also Davis discloses in FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

Conclusion

Applicant's amendment necessitated the new ground(s) of rejection presented in this Office action. Accordingly, **THIS ACTION IS MADE FINAL**. See MPEP

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§ 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

A shortened statutory period for reply to this final action is set to expire THREE MONTHS from the mailing date of this action. In the event a first reply is filed within TWO MONTHS of the mailing date of this final action and the advisory action is not mailed until after the end of the THREE-MONTH shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the date of this final action.

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Quoc A. Tran whose telephone number is 571-272-8664. The examiner can normally be reached on Mon through Fri 8AM - 5PM.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Doug Hutton can be reached on (571)272-4137. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

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Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Quoc A. Tran/
Examiner, Art Unit 2176

/DOUG HUTTON/
Supervisory Patent Examiner, Art Unit 2176